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1. INTRODUCTION

1.1 Overview

Respond CenterPoint™ is a system that helps you to record and track feedback, from the moment it is received by your organization, up to the time that it has been dealt with satisfactorily.

For each record, you can use **Respond CenterPoint** to capture:

- basic feedback details
- different aspects of the feedback, if this covers more than one issue
- contacts involved with the record
- activities carried out in connection with the record, for example correspondence and phone calls
- costs incurred as a result of the feedback
- any other information that is relevant to your organization.

Respond CenterPoint also contains powerful analytical features that allow you to:

- filter old or unwanted feedback and send it to archives
- perform complex searches on all feedback captured
- produce a variety of charts and reports.

1.2 Scope of this guide

This guide should be read by anyone who requires information on entering feedback into a database and analyzing that data.

The chapters contained in this guide are as follows:

- Chapter 2 – Getting Started
Describes **Respond CenterPoint's** card file and other basic aspects of the system
- Chapter 3 – Accessibility.
Describes how to use your keyboard to access tabs, fields, menus and menu options, and also how to perform functions.



The list of chapters has been shortened for the purposes of this sample document.



1.3 Related documents

There are two other guides in the **Respond CenterPoint** documentation set that you may find useful:

- Installing Respond CenterPoint
provides information on how to install **Respond CenterPoint**
- Setting Up A **Respond** Database.
provides information on how to set up and customize a database.

1.4 Conventions used in this guide

In order to draw your attention to certain items in the text and to help you understand instructions, this guide presents important items in a stylized way. Conventions are used for the following:

- menu options
- fields, checkboxes and radio buttons
- buttons on the screen and toolbars
- mouse actions
- other information.



This section has been shortened for the purposes of the sample document.

2. GETTING STARTED

2.1 Introduction

This chapter provides information to familiarize users with the fundamentals of **Respond CenterPoint**. It is assumed that readers have a basic familiarity with Windows-based systems.

The chapter covers starting **Respond CenterPoint**, opening and closing databases, viewing database activity, the **Respond CenterPoint** main window and the card file. It also describes how to enter and save data, how to set user preferences, how to get help on **Respond CenterPoint**, and how to exit **Respond CenterPoint**.

2.2 Starting **Respond CenterPoint**

Before you can use **Respond CenterPoint** you must start the system by selecting the *CenterPoint* menu option from the *Respond* program group within your Windows Start menu.

If you are starting **Respond CenterPoint** for the very first time, the Open Database dialog box is displayed (Figure 2-1). You must now select a database to open.

Alternatively:

If you have used **Respond CenterPoint** before, it remembers the last database you worked with and displays the Sign On dialog box (Figure 2-2) ready for you to sign on to that database.

The **Respond Integrated Sign-on** plug-in enables you to be automatically signed onto the appropriate **Respond** database, without requesting your User Id and Password details.



System Administrators cannot use the integrated sign-on facility, as they are required to enter their sign-on details for security reasons.



For information on setting up the **Respond Integrated Sign-on** plug-in, refer to Chapter 3 'Using **Respond Integrated Sign-on**' in the guide '**Respond Integrated Sign-on** Guide'.

2.3 Accessing databases

You can set up many different databases within **Respond CenterPoint** for recording feedback, compliments, incidents and so on. You need security access to a **Respond** database in order to work with the data contained in that database.

For each database you want to access, your System Administrator needs to allocate you a User Id and password, which you use to sign on to the database.



Access to databases is defined by your System Administrator in the security area. If you cannot access a database that you require or you do not know your User ID or password, you must contact your System Administrator.

Opening a database

To open a database:

1. Select the *Open Database* option from the File menu.

The Select Database dialog box is displayed, as shown in Figure 2-1.

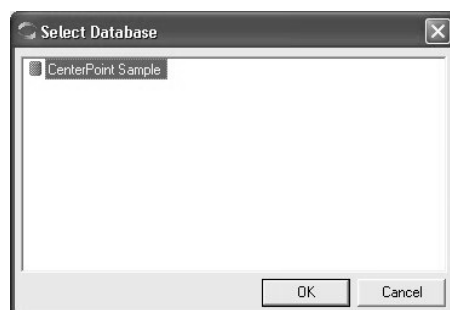


Figure 2-1 Select Database dialog box

2. Select the database you want to open from the list of databases displayed, then click on the **OK** button.

The Sign On dialog box is displayed, as shown in Figure 2-2.



Figure 2-2 Sign On dialog box

3. Enter your User Id and your password. **Respond CenterPoint** displays an asterisk (*) for every character you type in the **Password** field. This is to prevent anyone else from reading your password as you type it.

The **Respond Integrated Sign-on** plug-in enables you to be automatically signed onto the appropriate **Respond** database, without requesting your User Id and Password details.



System Administrators cannot use the integrated sign-on facility, as they are required to enter their sign-on details for security reasons.



For information on setting up the **Respond Integrated Sign-on** plug-in, refer to Chapter 3 'Using **Respond Integrated Sign-on**' in the guide '**Respond Integrated Sign-on** Guide'.

4. Click on the **OK** button. The **Respond CenterPoint** main window is displayed, with the database name displayed in the title bar.



For information on the layout of the **Respond CenterPoint** main window, refer to 'Understanding the **Respond CenterPoint** main window' on page 12.

Changing your password

Each time you sign on to a database, you have the opportunity to change your personal password. Changing your password affects only the database you are signing on to.

To change your password:

1. Start **Respond CenterPoint** and enter your User Id and password in the Sign On dialog box (Figure 2-2).
2. Select the **Change Password** checkbox to indicate that you want to specify a new password, then click on the **OK** button. The New Password dialog box is displayed, prompting you to enter your new password.
3. Enter your new password, then click on the **OK** button. The Confirm New Password dialog box is displayed, prompting you to verify your new password.
4. Enter your new password again, then click on the **OK** button. The **Respond CenterPoint** main window is displayed.

The next time you sign on to the database, you must remember to use your new password.

Opening the sample database

In addition to the databases set up by your organization, **Respond CenterPoint** is supplied with a sample database.



For information on installing the sample database, refer to Chapter 3 'Installing **Respond CenterPoint**' in the guide 'Installing **Respond CenterPoint**'.

You can use this database to:

- practise setting up and configuring a database
- teach yourself and other users to record and track feedback
- experiment with reporting, searching and charting.



To open the sample database, follow the steps in 'Opening a database' on page 4, making sure you select the *CenterPoint Sample* option from the Select Database dialog box.

If the sample database is not displayed in the list of databases, it has not yet been attached to **Respond CenterPoint**.



For information on attaching the sample database, refer to Chapter 4 'Maintaining Databases' in the guide 'Installing **Respond CenterPoint**' or contact your System Administrator.

Closing a database

To close a database, select the *Close Database* option from the File menu. **Respond CenterPoint** closes the database and removes the database name from the title bar.

2.4 Understanding the **Respond CenterPoint** main window

The **Respond CenterPoint** main window is displayed when you start **Respond CenterPoint**. You use this window to access all the main functions for capturing and handling feedback.

This window consists of the following areas:

- title bar
- menu bar
- button toolbar
- feedback toolbar
- card file
- status bar.

Figure 2-3 illustrates the different areas of the window.

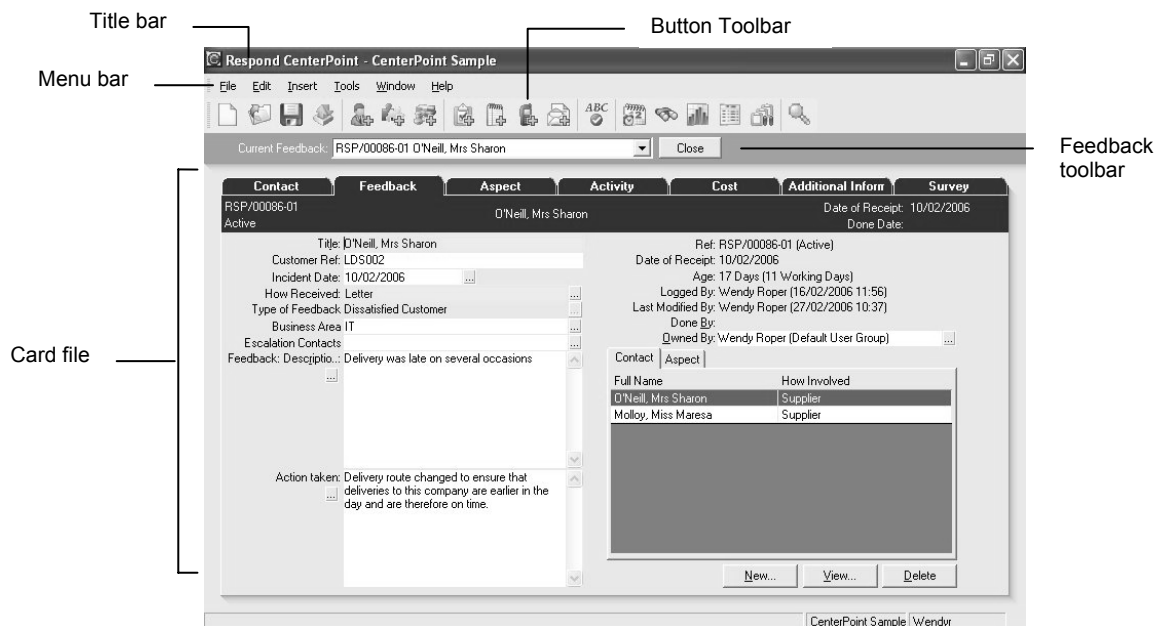


Figure 2-3 Respond CenterPoint main window













The title bar

The title bar shows the name of the database that is currently open. If no database name is displayed, there is no database currently open.

The button toolbar

The button toolbar contains shortcut buttons for commonly used functions. These are summarized in the following table.

Button	Description
	Creates a new record
	Opens an existing record
	Saves the current record
	Changes the status of the current record
	Adds a contact to the current record
	Adds an aspect to the current record
	Adds a cost to the current record
	Adds a task to the current record

	Adds a note to the current record
	Adds a telephone message to the current record
	Creates a new document for the current record
	Begins the Spell Checker facility
	Displays the Diary window
	Displays the Search window
	Displays the Chart window
	Displays the Report window
	Holds All Outstanding Tasks
	Re-Opens Outstanding Tasks
	Displays the Address Look-up window
	Displays the In Tray window

The Feedback toolbar

The Feedback toolbar is an optional toolbar that you can choose to display. It shows the title of the current record in a drop down list.

The drop down list lists all records currently open. You can switch between records simply by selecting the one you require.



For information on displaying the Feedback toolbar and setting the maximum number of records you can have open at once, refer to 'Setting your user preferences' on page 34.

The status bar

The status bar displays confirmation messages when you perform actions. It also displays your user name and the current database name.

2.5 Understanding **Respond CenterPoint** cards

You use the **Respond CenterPoint** card file to capture and maintain feedback details. When you first install **Respond CenterPoint**, there are five cards set up by default:

- Feedback card
- Contact card
- Aspect card
- Activity card
- Cost card.

Your organization may decide to re-name any of these cards. For example, the Feedback card may be re-named the Enquiry card. Your organization may also decide to not use cards that are not relevant or to add extra cards. It is also possible to lock the position of cards.

In addition, individual cards may be customized by:

- hiding fields
- customizing categories
- changing colors used.

The following sections describe each of the default cards, as customized within the sample database.

The Feedback card

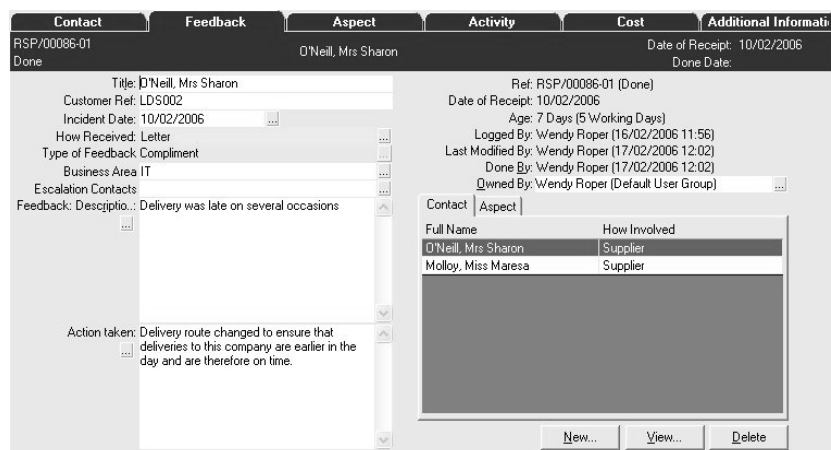
You use the Feedback card, shown in Figure 2-4, to capture basic details such as the title of the feedback, a description and the outcome. The card also shows:

- reference number and status
- the date on which the feedback was received
- the feedback age, which shows the number of elapsed and working days from the receipt date until now



If the feedback status is Done, the number of days is calculated from the receipt date to the done date.

- the name of the person who logged the feedback and when
- the name of the person who last modified the feedback and when
- the name of the person who changed the status of the feedback to Done
- the name of the person to whom it is allocated
- contacts and aspects involved.



Contact	Feedback	Aspect	Activity	Cost	Additional Information												
RSP/00086-01 Done		O'Neill, Mrs Sharon			Date of Receipt: 10/02/2006 Done Date:												
<p>Title: O'Neill, Mrs Sharon</p> <p>Customer Ref: LDS002</p> <p>Incident Date: 10/02/2006</p> <p>How Received: Letter</p> <p>Type of Feedback: Compliment</p> <p>Business Area: IT</p> <p>Escalation Contacts:</p> <p>Feedback: Description: Delivery was late on several occasions</p> <p>Action taken: Delivery route changed to ensure that deliveries to this company are earlier in the day and are therefore on time.</p>																	
<p>Ref: RSP/00086-01 (Done)</p> <p>Date of Receipt: 10/02/2006</p> <p>Age: 7 Days (5 Working Days)</p> <p>Logged By: Wendy Roper (16/02/2006 11:56)</p> <p>Last Modified By: Wendy Roper (17/02/2006 12:02)</p> <p>Done By: Wendy Roper (17/02/2006 12:02)</p> <p>Owned By: Wendy Roper (Default User Group)</p>																	
<table border="1"> <thead> <tr> <th>Contact</th> <th>Aspect</th> <th>Full Name</th> <th>How Involved</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>O'Neill, Mrs Sharon</td> <td>Supplier</td> </tr> <tr> <td></td> <td></td> <td>Molloy, Miss Maresa</td> <td>Supplier</td> </tr> </tbody> </table>						Contact	Aspect	Full Name	How Involved			O'Neill, Mrs Sharon	Supplier			Molloy, Miss Maresa	Supplier
Contact	Aspect	Full Name	How Involved														
		O'Neill, Mrs Sharon	Supplier														
		Molloy, Miss Maresa	Supplier														
<p>New... View... Delete</p>																	

Figure 2-4 Feedback card

In this example, the card is being used to record how the feedback was received, and type of feedback. The **Description** field is being used to record a brief summary of the feedback and the **Action taken** field is being used to record what action was taken in response to the feedback.



This chapter has been shortened for the purposes of the sample document.

3. ACCESSIBILITY

3.1 Introduction

Respond CenterPoint allows you to use your keyboard to access tabs, fields, menus and menu options, and also to perform functions. In this chapter, you will be given instructions on which keys to press depending on which actions you want to perform. This chapter also lists some of the features Microsoft Word offers to help people with disabilities and outlines some of the major shortcuts.

3.2 Accessing tabs and cards

You can use the left (←) and right (→) arrow keys on your keyboard to view the different tabs in a window. However, you cannot use these keys to access the cards/tabs in the **Respond CenterPoint** Main window. The default shortcut keys for accessing the different **Respond CenterPoint** cards are as follows:

Card	Shortcut keys
Contact	Shift+F1
Feedback	Shift+F2
Aspect	Shift+F3
Activity	Shift+F4
Cost	Shift+F5

You can set up your own shortcut keys to access the cards in the **Respond CenterPoint** Main window using the Customization Manager.



For information on using the Customization Manager to set up shortcut keys, refer to Chapter 3 'Using the Customization Manager' in the guide 'Setting Up A **Respond** Database'.

3.3 Accessing fields

You can access certain fields within **Respond CenterPoint** using the keys on your keyboard.

You can access the field you want by using the **Tab** key on your keyboard. Simply press the **Tab** key until you reach the field you want.

If the field contains a letter with an underscore, you can press the following keys to access the field:

Alt+ (the letter with the underscore)

For example, in Figure 3-1 the letter 'n' has an underscore in the **Contact** field. To access this field, you would simply press the **Alt+N** keys on your keyboard.



Figure 3-1 Contact field example

These shortcuts are either default shortcuts or have been configured using the Customization Manager.



Respond CenterPoint default commands take precedence over custom commands.



If a menu and a field have the same shortcut keys assigned to them, the menu shortcut will take precedence. Therefore, it is advisable not to set up a field with the same shortcut as a main menu.



For information on using the Customization Manager to set up shortcut keys, refer to Chapter 3 'Using the Customization Manager' in the guide 'Setting Up A **Respond** Database'.



This chapter has been shortened for the purposes of the sample documentation.

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